

Contracts+ Document Submittal Requirements

Important Note: Delete this page from the Main Document prior to submitting the contract to the Internal Review Round.

Retainer Renewal Award

REMINDER: The following documents must be submitted as PDF for the PSC before contract review can begin. After document reviews are completed by UOCP, an Award posting on the Procurement Bulletin will be requested. A reminder that CEI Review and PPB Waiver will be issued no sooner than on the 15th calendar day after the Award has been published on the Bulletin. Renewals are set up with \$0.00 amounts in C+.

- 1. If renewing vendor identifies a required update/change to previously submitted Form A or Form B**

Certifications and Disclosures or CPO Financial Disclosure Affidavit, CCU shall submit new documents for review and acceptance by UOCP. The Form A and Form B Certifications and Disclosures and CPO Financial Disclosure Affidavit can be found at <https://cpo-highered.illinois.gov/forms.html> .

 - a. If vendors Disclosures identify a potential Conflict of Interest, CCU shall submit a Conflict of Interest Review Request form to UOCP for review and approval (possibly requiring additional approvals from SPO, CPO and PPB). Please submit using the PDF version of the Conflict of Interest Review and Determination Form found at <https://cpo-highered.illinois.gov/forms.html> .
- 2. If renewing vendor states they have no required updates/changes to previously submitted Form A or Form B**

Certifications and Disclosures or CPO Financial Disclosure Affidavit, CCU shall state this in their request for renewal email to UOCP. Please note that SPO will require a Conflict of Interest Review Request form for each potential COI identified, regardless of last date of prior approval for the COI.

 - a. Email from vendor identifying no changes shall include vendor name, Discipline, and specifically state that they have no changes to report for their previously submitted Form A, Form B, or Financial Disclosure Affidavit or previously submitted award information.
- 3. Capital Construction Unit shall submit a completed Procurement Policy Board (PPB) Questions for Retainer Contract Renewal document for UOCP review and acceptance. Document is titled "Renewals of Extensions exceeding \$249,999" and can be found on the Chief Procurement Office – Forms site <https://cpo-highered.illinois.gov/forms.html> .**
 - a. Item 1.b shall document a detailed analysis of evaluations of the vendor's performance regarding any Retainer Work Orders completed as part of this Professional Services Retainer Agreement.
 - b. Item 1.b shall also document actual percentages of Consultant and Subconsultant BEP/VBP participation used to date on any Retainer Work Orders completed as part of this Professional Services Retainer Agreement, for both the current renewal time period and also the entire time period from the start of the agreement. Also identify the originally PSC proposed team percentages identified in Attachment D - PSC/Subconsultant Work Summary of their Professional Services Retainer Agreement and compare the average BEP/VBP participation to the original proposed team percentages. If work was completed by the Retainer and if this average BEP/VBP participation does not meet or exceed the original proposed team percentages identify how these values will be increased through a corrective action plan or do not renew. Office for Procurement Diversity (OPD) will review the corrective action plan or non-renewal request and provide concurrence.
- 4. When a renewing vendor falls short of meeting the contracted BEP goal as identified in Vendor Evaluations, the vendor and contracting University shall be required to complete a form to request a reduced BEP goal for consideration, for the current renewal, only. The form is titled, "BEP Goal Waiver Request Form" and can be found on the Chief Procurement Office – Forms site, <https://cpo-highered.illinois.gov/forms.html> . The University shall first submit the form to OPD for review and acceptance. OPD may add language to the form and will return form to University for signature, based on their review. OPD shall provide written concurrence/response which will be part of renewal information shared with UOCP from University. Additionally, when a vendor falls short of meeting the contracted team Veteran participation goal the University will share this information and share the reason the University still wants to renew with this vendor with OPD for their review and concurrence/response. This written OPD concurrence/response will be part of the renewal information shared with UOCP from University.**
 - a. The CPO's BEP Goal Waiver Request Form must be signed and submitted by CCU to UOCP who will share with the CPO and accepted prior to requesting a renewal of the contract.
 - b. If and when the request is accepted, the CPO will post the accepted form on the CPO's Publications & Reports website, BEP Waivers granted in the respective Fiscal Year, <https://cpo-highered.illinois.gov/publications-reports.html>
 - c. Although the renewing vendor is contracted to meet the VBP goals, at this time the CPO does not require the same documentation for contracted VBP goals as it does for contracted BEP goals. Information provided in Subsection 2.2 is to be consistent with the information shared in the PPB Questions document, Item 1.b, for this vendor.
 - d. As mentioned, the BEP Goal Waiver request only applies for the renewal term in question. The "revised BEP Goal" per Subsection 2.2 must be no less than the contracted BEP Goal for the renewing vendor, for any subsequent renewal(s).

- e. Reminders for completing the justification for waiver in Subsection 2.2 shall include the following information:
 - i. Include justification consistent with the PPB Question document)
 - ii. Justification should include a response from the contracting University along with the renewing vendor's response: a) University should state that they have reviewed the information and provide opinion, b) state that the University has reviewed the vendor's good faith effort and are in agreement and wish to proceed with renewal, c) Future corrective plan and efforts to achieve the contracted goals are documented in response, d) the current BEP team participation percentage should be stated for both the previous renewal timeframe and the total agreement timeframe...
 - iii. Include actual BEP percentage met the term in question so that the SPO has a basis to compare.
5. All the documents identified in 1 through 4 above shall be completed prior to being submitted by the representative CCU to UOCP for review and approval and should be submitted no later than April 1st in order for agreements to be fully executed before end of fiscal year.

[[Professional Services Firm - Contact Name]]
[[Name (Primary Second Party)]]
[[Street Line 1 (Primary Second Party)]]
[[City/Town (Primary Second Party)]], [[State/Province (Primary Second Party)]], [[Postal Code (Primary Second Party)]]

NOTICE OF EXERCISE OF OPTION

TYPE OF RETAINER AGREEMENT

[[Project Location]]

As of DATE, THE BOARD OF TRUSTEES OF THE UNIVERSITY OF ILLINOIS, a body corporate and politic of the State of Illinois, and [[Name (Primary Second Party)]], [[Street Line 1 (Primary Second Party)]], [[City/Town (Primary Second Party)]], [[State/Province (Primary Second Party)]], [[Postal Code (Primary Second Party)]], a(n) [[Professional Services Firm - Legal Structure]], existing under the laws of the State of [[Professional Services Firm - Laws of the State of]] entered into a Professional Services Consultant Retainer Agreement (“Agreement”) for DESCRIBE SERVICE. Article E of said Agreement provides that the terms of the Agreement can be extended for an additional one year period, from MONTH DATE, YEAR, through MONTH DATE, YEAR, inclusive, under the same terms and conditions, all subject to the availability of funds, upon mutual agreement between THE BOARD OF TRUSTEES OF THE UNIVERSITY OF ILLINOIS and [[Name (Primary Second Party)]].

The original Agreement is amended to include the attached revised hourly rate schedule as allowed per Section D.4 of the Agreement. The revised hourly rate schedule has been reviewed and accepted by the Owner. By executing this Notice of Exercise of Option, Vendor acknowledges and agrees that it is in compliance with the requirements of Article 50 of the Illinois Procurement Code (30 ILCS 500/50) as agreed upon in the original Agreement. These requirements remain in effect for the term of the Agreement and any remaining renewals and are a material requirement and condition of the Agreement. By executing this Notice of Exercise of Option, Vendor certifies compliance, and is under a continuing obligation to remain in compliance and to immediately report any non-compliance.

The documents are available at:

https://www.uocpres.uillinois.edu/contracts_forms/for_design_professionals

Through this Notice of Exercise of Option and pursuant to the Agreement, the Board of Trustees of the University of Illinois hereby exercises its option to extend the term of the Agent for an additional year, from MONTH DATE, YEAR, through MONTH DATE, YEAR, inclusive.

Receipt of this Notice of Exercise of Option is acknowledged by the following affixed signature.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as and of the day and year first hereinabove set forth.

<p style="text-align: center; color: gray; font-size: 24px;">University of Illinois Signature Block</p> <hr/> <p>Comptroller Delegate Signature</p> <hr/> <p>Signature Date</p>	<p>[[Name (Primary Second Party)]]</p> <hr/> <p>By</p> <hr/> <p>Printed</p> <hr/> <p>Title</p> <hr/> <p>Date</p>
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